

Oracle® Banking Origination DocuSign Integration Guide



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Purpose

This guide is to help with Integration of Oracle Banking Origination Product with Oracle Banking Digital Experience product.

Audience

This guide is intended for the Implementation and IT Staff to implement and maintain the software.

Documentation Accessibility

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Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Integration Guide

This topic provides the information about the DocuSign Integration Guide.

You can integrate Oracle Banking Origination with DocuSign for e-signing of the documents in origination process.

This document briefs about the specific steps needed for integration of these two products and specific maintenances.

This topic contains the following subtopics:

- [Maintenance in Oracle Banking Routing Hub](#)
This topic describes the systematic instructions to maintain Oracle Banking Routing Hub Configuration for Oracle Banking Origination.
- [Maintenance in Oracle Banking Origination Preferences](#)
This topic describes the systematic instructions to maintain **Origination Preferences** for **Oracle Banking Origination**.

1.1 Maintenance in Oracle Banking Routing Hub

This topic describes the systematic instructions to maintain Oracle Banking Routing Hub Configuration for Oracle Banking Origination.

This topic contains the following subtopics:

- [Maintenance of Service Providers and Consumer Services](#)
This topic describes the systematic instructions to maintain **Service Providers** and **Consumer Services** for **Oracle Banking Origination**.
- [Maintenance of Environment Variables](#)
This topic describes the systematic instructions to maintain **Environment Variables** in **Oracle Banking Routing Hub Configuration** for **Oracle Banking Origination**.

1.1.1 Maintenance of Service Providers and Consumer Services

This topic describes the systematic instructions to maintain **Service Providers** and **Consumer Services** for **Oracle Banking Origination**.

To maintain Oracle Banking Routing Hub configuration in common core for Oracle Banking Origination.

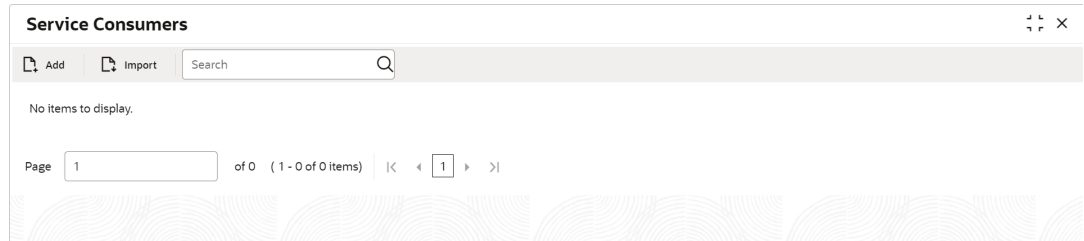
Specify **User ID** and **Password**, and login to **Home** screen.

To import the services:

1. On **Home** screen, click **Core Maintenance**. Under **Core Maintenance**, click **Routing Hub**.
2. Under **Routing Hub**, click **Service Consumers**.

The **Service Consumers** screen is displayed.

Figure 1-1 Service Consumers



3. Click **Import** and upload the **RPM_ORIGINATION_Consumer.json** file provided in the release and click **Extract**.

Figure 1-2 Success

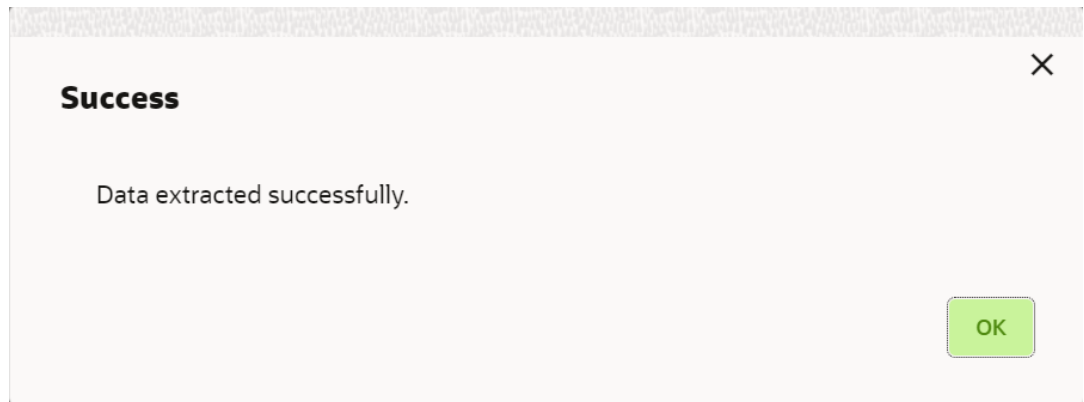
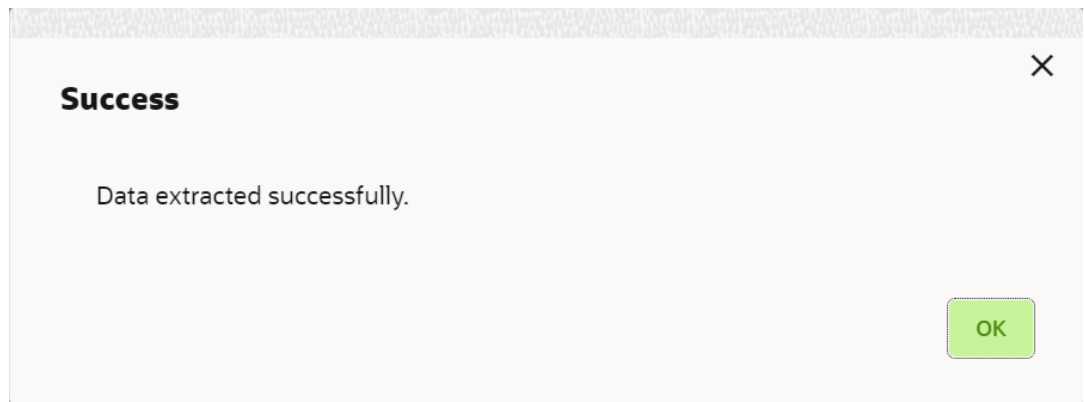


Figure 1-3 Success



4. Select **DOCUSIGN** ,and click **Import**.

Figure 1-4 Confirmation

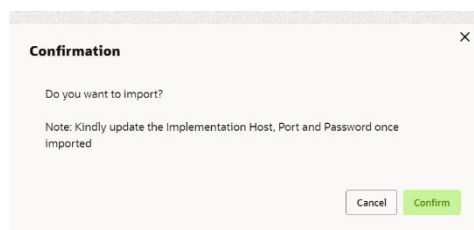
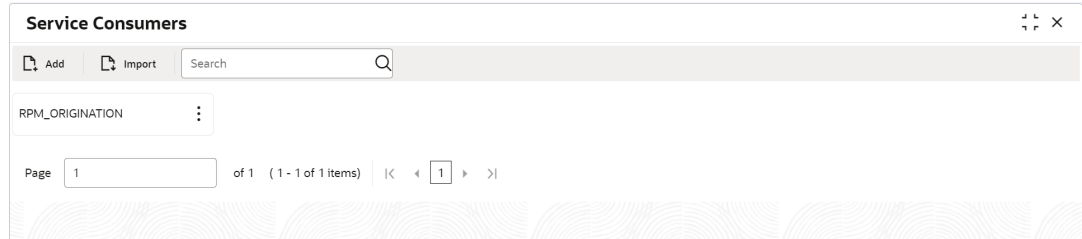


Figure 1-5 RPM Origination



5. Click **RPM_ORIGINATION**. Under **RPM_ORIGINATION**, click **DOCUSIGN**. Click **Edit**.
6. Change the host and port as per the oracle **DOCUSIGN** installation and Click **save** .
7. Repeat the same steps for all the DOCUSIGN Service Providers.
8. The below consumer services will be imported.

Table 1-1 Consumer Service

Consumer Service	Description
Create_Docusign_Envelope	<p>Usage: Create Docusign Envelope using different authentication</p> <p>Transformation: Create_Docusign_Envelope_No_Auth_Transform Create_Docusign_Envelope_Phone_Auth_Transform Create_Docusign_Envelope_AccessCode_Auth_Transform Create_Docusign_Envelope_IDV_Auth_Transform Create_Docusign_Envelope_KBA_Auth_Transform Get_JWT_Assertion Get_JWT_Access-Token_Transform</p>
Create_Docusign_Recipients_View	<p>Usage: To generate URL for In-Person signing</p> <p>Transformation: Create_Docusign_Recipients_View_Transform Get_JWT_Assertion Get_JWT_Access-Token_Transform</p>
Void_Docusign_Envelope	<p>Usage: Void created Docusign envelope</p> <p>Transformation: Void_Docusign_Envelope_Transform Get_JWT_Assertion Get_JWT_Access-Token_Transform</p>
Download_Docusign_Documents	<p>Usage: Download Signed Documents from Envelope</p> <p>Transformation: Download_Docusign_Documents_Transform Get_JWT_Assertion Get_JWT_Access-Token_Transform</p>

1.1.2 Maintenance of Environment Variables

This topic describes the systematic instructions to maintain **Environment Variables** in **Oracle Banking Routing Hub Configuration** for **Oracle Banking Origination**.

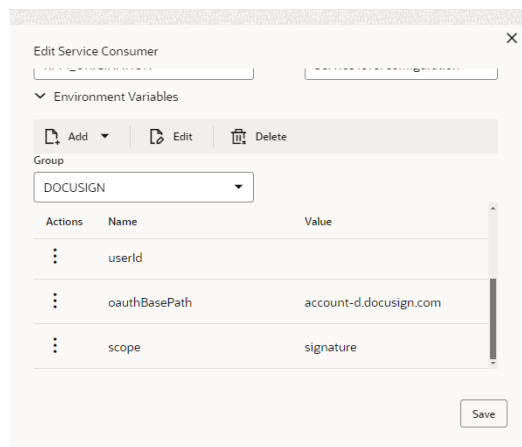
To maintain **Environment Variables** in **Oracle Banking Routing Hub** configuration for **Oracle Banking Origination**.

Specify **User ID** and **Password**, and login to **Home** screen.

To import the services:

1. From **Home** screen, click **Core Maintenance**. Under **Core Maintenance**, click **Routing Hub**.
2. Under **Routing Hub**, click **Service Consumers**.
3. Click **Edit**.

Figure 1-6 Edit Service Consumers



4. Under **Environment Variables**, add **DOCUSIGN** as new group.

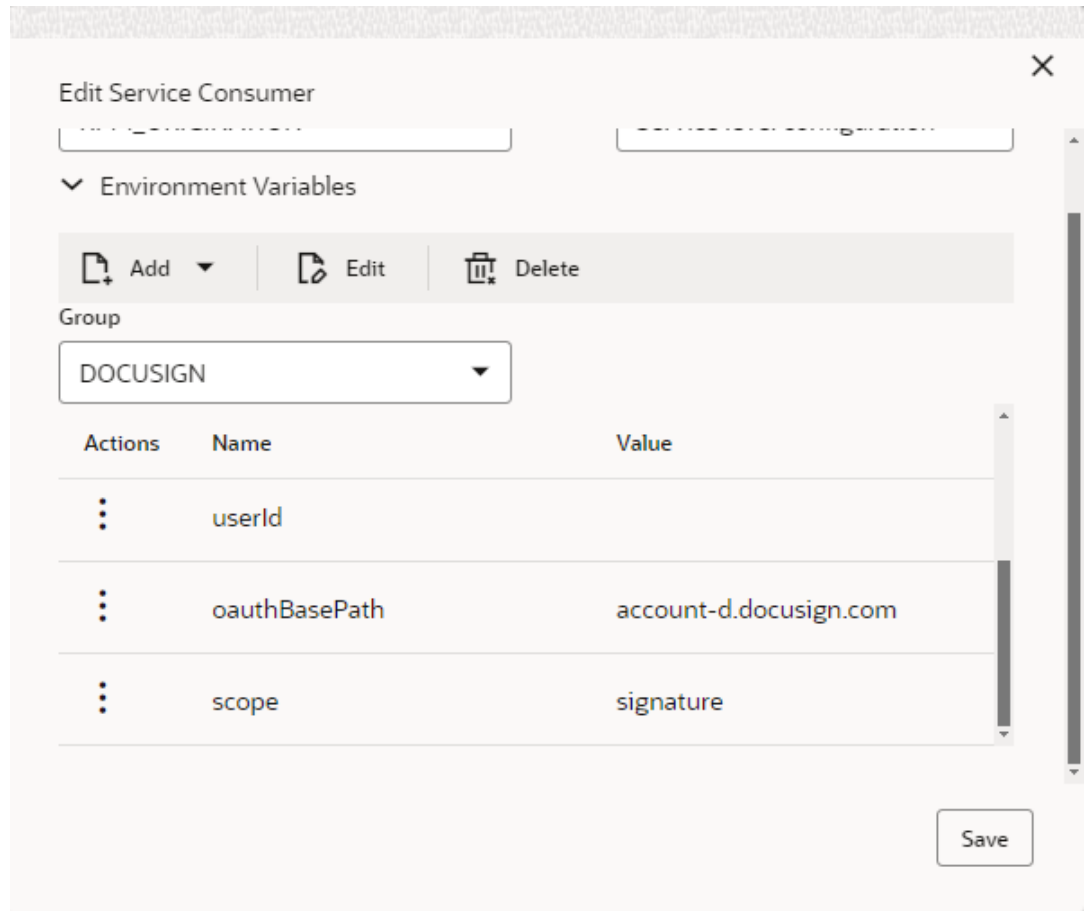
Figure 1-7 Add Group

The screenshot shows a dialog box titled "Edit Service Consumer". It contains the following elements:

- Name:** A text input field containing "RPM_ORIGINATION".
- Audit Type:** A dropdown menu showing "Service level configuration".
- Environment Variables:** A section with a downward arrow icon and the text "Environment Variables".
- Group:** A dropdown menu showing "DOCUSIGN".
- Toolbar:** A horizontal bar with three icons: "Add" (plus icon), "Edit" (pencil icon), and "Delete" (trash icon).
- Table:** A table with three columns: "Actions", "Name", and "Value". The table is currently empty.
- Save Button:** A button labeled "Save" located at the bottom right of the dialog.

5. Add following as new variable and update respective values as per DOCUSIGN account and click **Save**.
 - a. accountId : <your_docusign_account_id>
 - b. recipientAuthMethod : default is **NOAUTH**
 - c. clientId: <your_integration_key>
 - d. userId: <your_user_id>
 - e. oauthBasePath: default is **account-d.docusign.com (developer environment)**
 - f. scope: default is **signature**

Figure 1-8 Add Variable



6. Click **RPM_ORIGINATION**.
7. Under **RPM_ORIGINATION**, click **Consumer Services**.
8. For all consumer services, refer [Table 1-1](#) section.
 - a. Search **Void_Docusign_Envelope**.
 - b. Click **Edit**.
 - c. Add **Account Id** as new attribute, add json path and Click **Save**.

Figure 1-9 Add Attribute

Edit Service

ID: Void_Docusign_Envelope

Status:

Audit: Yes No

⚠ Applicable if the Audit type at 'Service Consumer' is 'Service level configuration'

Description: Void Docusign Envelope

Add

Actions	Attribute Name	json path
⋮	accountId	\$.env.DOCUSIGN.accountId

Save

9. Follow the below steps for Create_Docusign_Envelope consumer service.
 - a. Search **Create_Docusign_Envelope**.
 - b. Click **Edit**.
 - c. Add **RECIPIENT_AUTH_METHOD** as new attribute, add **\$.env.DOCUSIGN.recipientAuthMethod** json path and click **Save**.

Figure 1-10 Edit Service

Void_Docusign_Envelope

Void Docusign Envelope

Actions	Attribute Name	json path
⋮	accountId	\$.env.DOCUSIGN.accountId

- d. Click **Create_Docusign_Envelope** Consumer service.
- e. Click **Routing**.
- f. Click **Edit** for Create_Docusign_Envelope_No_Auth_Route route.
- g. Click on **Custom Rule**. Click on **Expression Editor**.
- h. Add **RECIPIENT_AUTH_METHOD** as attribute (refer 9.c) and **NOAUTH** as value. **Save**.

Figure 1-11 Expression Editor

Expression Editor

Attribute: RECIPIENT_AUTH_METHOD Operator: == Value: "NOAUTH" Condition Type: ||

Attribute: RECIPIENT_AUTH_METHOD Operator: == Value: "" Condition Type: Select

Save

Figure 1-12 Saved Expression

Edit Route

Name: Create_Docusign_Envelope_No_Aut Start/Stop: START STOP

Auto Shutdown:

Default Rule: Custom Rule:

Rule: (RECIPIENT_AUTH_METHOD == "NOAUTH") || (RECIPIENT_AUTH_METHOD == "")

Expression Editor

Transformations: Add

Actions Product Processor Implementation Transformation

Save

- i. The figure above shows all other authentication routes,

Figure 1-13 Service Consumers

The screenshot shows the 'Service Consumers' interface with the 'Routing' tab selected. The breadcrumb path is 'RPM_ORIGINATION > Consumer Services > Create_Docusign_Envelope'. Below the breadcrumb is a search bar with 'Add' and 'Search' buttons. The main table lists three routing actions:

Actions	Name	Start/Stop	Rule	Product Processor	Implementation	Service
⋮	Create_Docusign_Envelope_KBA_Auth_Route	■	(RECIPIENT_AUTH_METHOD == "KBA")	DOCUSIGN 1.0	DOCUSIGN_RESTAPI	Create an Envelop
⋮	Create_Docusign_Envelope_No_Auth_Route	■	(RECIPIENT_AUTH_METHOD == "NOAUTH") (RECIPIENT_AUTH_METHOD == "")	DOCUSIGN 1.0	DOCUSIGN_RESTAPI	Create an Envelop
⋮	Create_Docusign_Envelope_IDV_Auth_Route	■	(RECIPIENT_AUTH_METHOD == "IDV")	DOCUSIGN 1.0	DOCUSIGN_RESTAPI	Create an Envelop

At the bottom, there is a pagination control showing 'Page 1 of 1 (1 - 5 of 5 items)' with navigation arrows.

- j. For all authentication routes, you should follow these steps (f, g, h, i) as shown on the expression screen.

1.2 Maintenance in Oracle Banking Origination Preferences

This topic describes the systematic instructions to maintain **Origination Preferences** for **Oracle Banking Origination**.

Refer the **Origination Preferences in Configuration User Guide** to configure the **DocuSign Integration**.

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